



## Automation Committee Agenda Packet

SAN JOAQUIN VALLEY  
LIBRARY SYSTEM  
2420 Mariposa Street  
Fresno, CA 93721  
559-600-6256

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September 20, 2023

Woodward Park Library

10:00 a.m.

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**The next meeting of the SJVLS Automation Committee will be held at:**

**Woodward Park Library  
944 E Perrin Ave  
Fresno, CA 93720  
September 20, 2023, at 10:00 a.m.**

Enclosed are the agenda and prepared attachments for this meeting.

Copies of these materials may be made at the public's expense.

**Accessibility and Accommodations:** In accordance with the Americans with Disabilities Act, if you need special assistance to participate in this meeting, please contact the San Joaquin Valley Library System at (559) 600-6256 no later than 10:00 a.m. on Tuesday, September 19, 2023.

**Public records:** Disclosable public records related to this agenda are available for public review at the Fresno County Public Library, Business Office, located at 2420 Mariposa Street, Fresno, CA 93721, during regular business hours, 8:00 a.m. – 5:00 p.m., Monday through Friday.

## **AGENDA**

### **A. COUNCIL OPENING**

1. Call to Order
2. Introductions
3. Adoption of the Agenda
4. Public Comment – The Public may comment on any items relative to SJVLS and not on the agenda.

### **B. APPROVAL OF MINUTES OF JULY 19, 2023 (ATTACHMENT 1)**

### **C. ITEMS FOR DISCUSSION AND ACTION**

1. DISCUSSION: Windows 11 Policy Challenges – Vang (Attachment 2)
2. DISCUSSION: Barcodes for Items – Wymer
3. DISCUSSION: Cataloging Services – Wymer
4. ACTION: Removing Oracle Java – Wymer/Vang
5. DISCUSSION: Horizon Migration – Wymer (Attachment 3)
6. ACTION: Review and Update Default Notice Language – Wymer (Attachment 4)

### **D. STAFF REPORTS**

1. Senior Network Systems Engineer
2. Associate System Administrator
3. System Administrator

### **E. CALENDAR ITEMS**

1. Set the date and agenda building for the next meeting, tentatively Wednesday, November 15, 2023, online via Microsoft Teams.

### **F. ANNOUNCEMENTS**

1. Committee members can share items relating to collaboration, innovation, and professional development of interest to the Committee.

### **G. ADJOURNMENT**



# SAN JOAQUIN VALLEY LIBRARY SYSTEM

## Automation Committee Meeting

### July 19, 2023

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### DRAFT MINUTES

#### A. CALL TO ORDER

1. The meeting was called to order at 10:03 a.m. by Chris Wymer

#### B. ROLL CALL AND INTRODUCTIONS

1. Roll call was conducted.
  - i. PRESENT
    1. Yvonne Galvan (Coalinga-Huron), Kristie Pratt (Kern), Brian Martin (Kings), Heidi Clark (Tulare City), Faythe Arredondo (Tulare County), Chris Wymer (Chair), Trinitie Wood (Porterville), Krista Riggs (Madera)
  - ii. EXCUSED
    1. Tiffany Polfer (Fresno), Matt Johnson (Mariposa), Sarah McIntyre (Madera), Smruti Deshpande (Merced), Anthony Arellano (Porterville)
  - iii. OTHERS PRESENT
    1. Kevin Nelson (SJVLS), Mike Drake (SJVLS), Sheri Haveman (Tulare City)

#### C. ADOPTION OF THE AGENDA

1. Pratt (Kern County) motioned to adopt the agenda.
  - i. Clark (Tulare City) seconded the motion.
  - ii. The motion passed.

#### D. PUBLIC COMMENT

1. There were no comments from the public.

#### E. APPROVAL OF PREVIOUS MEETING MINUTES

1. Clark (Tulare City) motioned to adopt the minutes with revisions to correct grammar and spelling.
  - i. Pratt (Kern County) seconded the motion.
  - ii. The motion passed.

#### F. PROJECTS FOR DISCUSSION AND ACTION

1. Remove old Driver's License Field from Borrower Record Display – Wymer

- i. Wymer presented a request from Fresno County asking to remove the old driver's license field from the borrower record display in Horizon. The old field was left visible in borrower records to help staff clean up driver's licenses that did not transfer to the new field correctly. This was mostly around data that included more than the driver's license. Pratt asked if staff had finished correcting values that didn't transfer correctly. Wymer responded that he wasn't sure but could run a report to locate borrowers where the values differed so they could be reviewed. He added that even though the values no longer display, they're still retained in the database, if they're ever needed. Arredondo said that it's not being checked, and some staff are confused about why it's showing.
    - ii. Clark (Tulare City) motioned to remove the old driver's license field from the borrower record display.
      1. Pratt (Kern County) seconded.
      2. The motion passed.
2. Horizon Migration – Wymer
  - i. Wymer informed the committee that SirsiDynix no longer supports Sybase as an underlying database for our Horizon ILS. When SirsiDynix began working on the newest version of Horizon they discovered a bug in Sybase that prevented them from enabling new features. As a result, Horizon is now only supported with the MSSQL database, and SJVLS must migrate to upgrade Horizon and take advantage of new features. The cost for the MSSQL license and data migration is \$14,000. MSSQL licensing will increase our annual maintenance by \$2,430 in the second year.
  - ii. Wymer provided the committee with the steps for the migration process. Pratt asked what type of clean-up work would be required to prepare Comres for the migration. Wymer said he would check with SirsiDynix and let her know, and he will keep the JSAs informed throughout the process.
  - iii. Pratt (Kern County) motioned to send a recommendation to Administrative Council to migrate Horizon to MSSQL.
    1. Arredondo (Tulare County) seconded.
    2. The motion passed.
3. Web Services and SIP Migration – Wymer
  - i. Wymer informed the committee that SJVLS needs to migrate the Web Services and SIP servers to new versions of Windows Server prior to the current versions reaching end of support at the beginning of October. SJVLS will be responsible for purchasing Windows Server licenses and the appropriate number of CALs (Client Access Licenses), and SirsiDynix will migrate their software to the new servers. The cost for all 3 migrations is \$3,380.
  - ii. Clark (Tulare City) motioned to approve the migration.
    1. Martin (Kings) seconded.
    2. The motion passed.
4. Upgrade Enterprise and Kids Catalog to Latest Versions – Wymer
  - i. SirsiDynix has released new versions of Enterprise and the Kids Catalog template. Wymer provided the committee with an overview of the new features and bug fixes. The new version of Enterprise introduces an

enhancement to patron's preferred pickup locations. Previously, when a patron's preferred pickup location was no longer available, Enterprise would default to the first available pickup location for that jurisdiction. Often the location selected was not a branch that was easily accessible for a patron, and it created complications trying to correct the wrong pickup locations. The new version of Enterprise will prompt patrons to update their preferred pickup location when viewing their My Account preferences, helping avoid the issues we encountered previously. The new version of the Kid's Catalog fixes a bug in the search breadcrumbs and provides other small enhancements.

- ii. Pratt asked if they were able to get statistics on the usage of the Kid's Catalog template. Drake will investigate what's possible in Google Analytics and give Pratt an update.
  - iii. Pratt (Kern County) motioned to upgrade Enterprise and the Kid's Catalog template.
    1. Clark (Tulare City) seconded.
    2. The motion passed.
5. Upgrade Web Services to the Latest Version – Wymer
- i. Wymer informed the committee that a new version of Web Services has been released. This version introduces support for the database changes in the newest version of Horizon. It also introduces new end points to support new features added to BlueCloud products. Wymer would like to upgrade Web Services now in order to continue testing new releases of BlueCloud Circulation and Cataloging as well as preparing for the Horizon upgrade.
  - ii. Martin (Kings County) motioned to upgrade Web Services.
    1. Pratt (Kern County) seconded.
    2. The motion passed.
6. Self-Registration – Wymer
- i. Wymer provided answers to the committee's questions from the previous meeting about self-registration. Wymer informed the committee that address updates to USPS data take between 1 and 3 months, and new addresses can take the same amount of time to become valid.
  - ii. For young adult patrons whose last name does not match their parent or guardian's last name, the self-registration form could ask for parent/guardian information to help avoid errors during the registration process. While it would simplify the verification process, implementing this feature isn't straightforward because some of our member libraries do not require parent/guardian information for young adult cards. Pratt asked if the form could ask for the information, but not use it when creating borrower records. Wymer said he would check with the vendor. Martin asked why we need to record parent/guardian information on young adult cards. Wymer said that it's needed in the event a borrower is sent to collections.
  - iii. A solution to patrons entering their home address twice is to change how we display the address fields on the form. Currently, home and mailing address fields are displayed when the form loads, and patrons have to check a checkbox to indicate that their home address is the

- same as their mailing address. By changing the mailing address to not display when the form loads, and making the checkbox selected by default, patrons would have to uncheck the box to enter an additional address.
- iv. To address confusion regarding what information is needed in the suffix field, the vendor recommends changing from a free-text field to a select list of possible values. This would introduce controls over the data being entered into the database.
  - v. The vendor indicated that members could add the form to the web pages. The form would inherit the member's web page styles, ensuring consistency across different web sites.
7. Cataloging Services to non-Cat Center Libraries – Wymer
- i. Wymer informed the committee that Fresno County has announced they will no longer offer cataloging services to non-cat center libraries, effective June 30, 2024. This will require SJVLS to completely change our model for importing and creating bibliographic records.
  - ii. Pratt mentioned that Kern County would not be able to take over the work previously performed by Fresno County.
  - iii. Clark asked Wymer what options were possible and could be considered. Currently, there are 3 possible approaches to changing how we manage cataloging. The first option would be to allow all members to create, import, and manage records at their discretion. The second option would be to outsource cataloging services for non-cataloging member libraries to a 3<sup>rd</sup> party vendor. The last option would be to expand SJVLS staff and add a cataloger. Each approach has its own pros and cons, and there isn't a clear best option.
  - iv. Riggs mentioned that with proper training and trust in staff, that it could be possible for each member to catalog their own materials. Galvan asked if they would be given training if each member handles their own catalog records.
  - v. Wymer said that this item would be presented to Administrative Council at their next meeting, and the Council would determine our next steps. Wymer would like to see a working group created, composed of 2 members that are Cataloging Centers and 2 members that are not, to balance perspectives when considering potential options.

## **G. STAFF REPORTS**

1. Senior Systems Network Engineer
  - i. Nelson provided an update on the network. CENIC Year 9 projects are starting to move forward. Additionally, we're down to seven T1 connections, and four 10mbps branches. Nelson informed the committee that SJVLS is still waiting on funding decisions from USAC regarding the large WiFi Expansion project.
2. Associate System Administrator
  - i. Drake informed the committee that he completed a request from Merced to delete unused collection codes. He learned a lot during the process, and it will be helpful when we need to delete more in the future. If anyone would like to clean up their unused codes, they can contact him to start the process.

3. System Administrator
  - i. Wymer informed the committee that the new Telemessaging server was received and installed. He's going to start working with the Telemessaging software vendor to migrate the Telemessaging software to the new server. He will keep the committee updated on dates for the migration.
  - ii. Wymer then informed the committee that the first set of closed locations were deleted for Kern County.
  - iii. Wymer informed the committee that the annual stats reports are ready for the members. He will send a reminder email in early September, as the State Report deadline gets closer. He asked the committee members to forward him a copy of the State Library Report when they receive it, so he can review the data collected and make sure SJVLS is recording it.
  - iv. Wymer let the committee know that the Electronic Resources Committee is preparing to release a survey on e-Resources for patrons to respond to. The link will be posted in both Enterprise and BC Mobile, and he'll send an update when the survey goes live.

#### **H. CALENDAR ITEMS**

1. Date and location for next Automation Committee Meeting
  - i. Wednesday September 20, 2023, at 10:00 am at the Woodward Park Library.

#### **I. ANNOUNCEMENTS**

1. Martin shared that he's setting up patron surveys on self-check stations. It's a new feature from TechLogic.
2. Clark shared that Tulare Public Library wrapped up their Summer Reading Program. They set a community goal of reading 45,000 minutes, and at the end of the program the community read more than 72,000 minutes. Clark is preparing for school visits to the library from 4<sup>th</sup> grade classes.

#### **J. ADJOURNMENT**

1. There being no further business to discuss the meeting adjourned at 11:44 a.m.

**DATE:** September 20<sup>th</sup>, 2023  
**TO:** Automation Committee  
**SUBMITTED BY:** Logic Vang – Network Systems Engineer  
**SUBJECT:** Windows 11 Policy Challenges

### **DISCUSSION:**

In lab testing, Windows 11 have not proven itself to be reliable. There were certain changes made in Windows 11 (comparing to Windows 10) that are causing issues with the current methods we use to secure the public accounts. Certain Windows features, built-in apps, and local policies are failing to take effect when security policies were applied.

List of significant issues we're encountering:

Disabling cloud account integration from within Windows Apps: (Google/Facebook/Apple Accounts).

Disabling web and application search integration from Windows Explorer.

Disabling access to certain system settings.

Recommendation is to withhold Windows 11 migration until possible solutions are found or issues are patched by Microsoft.

Any new devices planned to be purchased are to be pre-loaded with Windows 10 from the manufacturer if possible or manually rolled back once arrived.

This applies to both Desktop and Laptops.

Motion:

Second:

\_\_\_\_\_ PASSED

\_\_\_\_\_ REJECTED



**DATE:** September 20, 2023

**TO:** Automation Committee

**SUBMITTED BY:** Chris Wymer – Administrative Librarian

**SUBJECT:** Horizon Migration

## **DISCUSSION:**

We are preparing to migrate Horizon to MSSQL. At the same time, we will upgrade both SIP servers as well as the Web Services server. After discussion with SirsiDynix, the consensus was to configure the new Horizon server with the newest version of Horizon (version 7.6.0), and the new SIP and Web Services servers will be configured to point to the updated Horizon server. This allows the new SIP server to be staged with the latest version of SIP, so we can test both standard functionalities, as well as the new features introduced in Horizon 7.6.0. Web Services already has the most recent release installed and the only task to complete is upgrading the version of Windows Server. It's worth noting that we will not migrate HIP.

When testing is complete, all three upgraded servers will be put into production at the same time, completing both the server migrations and Horizon upgrade in the same step. This approach was taken to minimize the impact on both staff and patrons as opposed to migrating the servers and later upgrading Horizon.

## **TIMELINE**

1. Purchase Windows Server 2022 licenses.
2. Stage new VMs for Horizon, Web Services, SIP1, SIP3.
3. Inform SirsiDynix that VMs are ready.
4. SirsiDynix installs software on the new VMs.
  - a. Horizon Server
    - i. Install and configure MSSQL instance.
    - ii. Re-create database objects (tables, triggers, stored procedures, etc)
    - iii. *We need to decide if we want to reduce our database logins or keep one per branch*
  - b. SIP1 & SIP3
    - i. Setup/re-create SIP instance(s) on new servers.
  - c. Web Services
    - i. Install and configure Web Services instance.
5. SJVLS staff install SQL client tools and create connections to the new database.
6. SJVLS staff perform initial testing, including:
  - a. Connections to new database
  - b. Basic Horizon functionality
  - c. SQL tool connectivity and configuration
7. General testing period begins with member library staff.
  - a. *Need to select testing locations (preference would be Fresno Central and Tulare Public)*
  - b. Features to test:
    - i. Acquisitions Imports/Exports
      1. Purchase Order creation
      2. Order export processes
      3. Importing Statements
      4. Voucher creation
      5. Importing full bib and item records

- ii. Cataloging
  - 1. Record imports
  - 2. Record exports
- iii. Circulation
  - 1. Self-check stations
  - 2. RFID tags and pads
  - 3. Pull list
- iv. SJVLS Customizations – SQL scripts
  - 1. 005 & 999 tags process
  - 2. DayEnd Tasks
  - 3. Monthly Stats
  - 4. Quarterly ILL (transits) Stats
  - 5. Delete and Update OCLC Holdings
  - 6. Patron Purge scripts
    - a. Kern relief of accountability
    - b. 3-year inactive purge
    - c. 7-year inactive purge
  - 7. ECF Tracking script
  - 8. Expired Card Emails
    - a. JTMail Config & Database connection
- v. Harvests?
- vi. Jasper Reports
  - 1. Clone current server and update datasource to point to MSSQL?
  - 2. Create datasource in current instance?
- vii. Migrate AuthApp to new Web Services server
- 8. Put new Horizon server into production – “Go Live”
  - a. Communication during the production migration will take place in a dedicated Teams channel.
  - b. Production migration will take 4-6 hours
  - c. All workstations will need to have the updated Client installed.
    - i. The Horizon Client shortcut will need its properties updated so the target indicates Horizon is connecting to an MSSQL database.
  - d. All workstations will need the new database connection set up.
  - e. SJVLS will verify the migration was successful.
    - i. Will we need to update views (borrower registration)?
    - ii. Can we pre-stage the customized view?
  - f. SJVLS will update DNS entries & transfer IP addresses to put SIP and Web Services into production
    - i. Horizon server will get a new IP address and DNS entry for iols.sjvls.org will be moved to the new server
    - ii. The IP addresses from the old SIP servers will be transferred to the new SIP servers
    - iii. The DNS entry for Web Services will be updated to point to the new server
  - g. Tell staff they can begin logging in
- 9. Comres will be migrated after the Horizon migration is completed.

**DATE:** September 20, 2023  
**TO:** Automation Committee  
**SUBMITTED BY:** Chris Wymer – Administrative Librarian  
**SUBJECT:** Review and Update Default Notice Language

**RECOMMENDED ACTION:**

1. Update the default notice language for notices, based on the committee's recommendations, to use more professional and courteous language.

Approval of the recommended action will authorize SJVLS staff to update the default notice language for selected notices.

**ALTERNATIVE ACTION(S):**

Alternatively, the committee may decide to leave the default notice language unchanged.

**FISCAL IMPACT:**

There is no fiscal impact associated with the recommended action.

**DISCUSSION:**

It has been a long time since SJVLS reviewed our default notice language for patron communications. Recently, Tulare County requested that we review our current notice language and modify the notice language for second overdue notices to use wording that's more customer service oriented.

Attached to this agenda item is the default notice language for all the notices we send to patrons. Because each library can customize the header and footer layout of notices, only the shared notice language for each notice is provided.

**PRIOR AGENDA REFERENCE:**

No prior reference

**ATTACHMENTS INCLUDED AND/OR ON FILE:**

Attachment – Current default notice language

Motion: \_\_\_\_\_ Second: \_\_\_\_\_

\_\_\_\_\_ PASSED                      \_\_\_\_\_ REJECTED

## CURRENT NOTICE LANGUAGE

### HOLD NOTIFICATION – MAIL/EMAIL

Printed Notice:

The following item(s) are being held for you until the date shown below. Your library may still offer curbside pickup or have limited hours. For more information about ways to pick up your hold(s) and current hours please contact your library.

Email Notice:

The following item(s) are being held for you until the date shown below. Your library may still offer curbside pickup or have limited hours. For more information about ways to pick up your hold(s) and current hours please contact your library. Do not reply to this email contact the library directly.

### HOLD NOTIFICATION – PHONE

Printed Notice:

The following items are being held for you. Please pickup within 7 days of the date shown above.

Email Notice:

*Same as printed notice*

### HOLD NOTIFICATION – SMS

Text Notice:

A hold is ready for pickup at the library. Check ValleyCat for details. Sus articulos estan listos para recoger a la biblioteca. Verifique en ValleyCat.

### PRE-OVERDUE NOTICE

Email Notice:

Header: This is a courtesy reminder from the Tulare County Library that the following item(s) will be due on

Footer: If you would like to renew them call 866-290-8681 to use our automated phone renewal system OR renew online at Tulare County: <https://go.sjvls.org/tularecountycatalog> \*\*\* You will need your library card number and PIN to renew. \*\*\* Thank you

### FIRST OVERDUE NOTICE

Printed Notice:

First Overdue Notice. Library records show the following item(s) overdue. If you have returned them please excuse this notice. Otherwise please return them as soon as possible to avoid increasing fines.

Email Notice:

1st Overdue Notice. Library records show the following item(s) overdue. If you have returned them please excuse this notice. Otherwise return them as soon as possible to avoid increasing fines. Do not reply to this email contact the library directly.

### **SECOND OVERDUE NOTICE**

Printed Notice:

Second Overdue Notice. The following item(s) are now very late. Fines are becoming substantial. Please take action to resolve the problem immediately.

Email Notice:

*Same as printed notice*

### **THIRD OVERDUE NOTICE**

Printed Notice:

Third Overdue Notice. The following item(s) has(have) been overdue for quite some time. Please resolve this problem before we are forced to bill you for replacement of the item(s).

Email Notice:

*Same as printed notice*

### **FOURTH OVERDUE NOTICE**

Printed Notice:

Fourth Overdue Notice. The following item(s) has(have) been overdue for quite some time. Please resolve this problem before we are forced to bill you for replacement of the item(s).

Email Notice:

*Same as printed notice*

### **FIRST OVERDUE NOTICE – SMS**

Text Notice:

You have one or more library items overdue. This is the first notice. Tiene uno o mas articulos de la biblioteca vencidos. Este es su primer aviso.

### **SECOND OVERDUE NOTICE – SMS**

Text Notice:

You have one or more library items overdue. This is the second notice. Tiene uno o mas articulos de la biblioteca vencidos. Este es su segundo aviso.

### **THIRD OVERDUE NOTICE – SMS**

Text Notice:

You have one or more library items overdue. This is the third notice. Tiene uno o mas articulos de la biblioteca vencidos. Este es su tercer aviso.

### **FINAL OVERDUE NOTICE – SMS**

Text Notice:

You have one or more library items overdue. This is the final notice. Tiene uno o mas articulos de la biblioteca vencidos. Este es su ultima aviso.

### **LOST**

Printed Notice:

The following item is now considered lost and you have been charged for its value. Lost processing fees may also apply. Please contact the library immediately to resolve the charges and avoid placement of your account with a collection agency.

Email Notice:

*Same as printed notice*

### **BILLING NOTICE**

Printed Notice:

Library records show that the following charges have not been paid. Please resolve them soon. If you have already contacted the library please disregard this notice. Delinquent accounts may be sent to a collection agency. Thank you.

Email Notice:

*Same as printed notice*

### **DAMAGED**

Printed Notice:

The materials listed were damaged in your possession and a fine has been charged to your account.

Email Notice:

*Same as printed notice*